

1998 IA 1040

Iowa Individual Income Tax Long Form

FOR OFFICE USE ONLY

or fiscal year beginning ___/___/1998 and ending ___/___/___ ☐ Check if first-time Iowa filer.
STEP 1: Place your label below or fill in the blanks if you do not have a label.

Last name A.	Your first name/middle initial	Social Security Number ●
Spouse's last name B.	Spouse's first name/middle initial	Social Security Number ●
Current mailing address (number and street, apartment, lot or suite number) or PO Box		
City, State, ZIP		

Are your name, your spouse's name, if applicable, and your address the same as on last year's return? <input type="checkbox"/> YES <input type="checkbox"/> NO	Your Occupation ●
	Spouse's Occupation ●
	Residence on 12/31/98 County No. ● Sch.Dist.No. ●
School District Name	

STEP 2 Filing Status: Mark one box only.

1	Single: Were you claimed as a dependent on another person's Iowa return? <input type="checkbox"/> YES <input type="checkbox"/> NO ▲
2	Married filing a joint return.
3	Married filing separately on this combined return. Spouse use column B.
4	Married filing separate returns. Spouse's name: SSN: ▲ Income: \$
5	Head of household with qualifying person. If qualifying person is not claimed as a dependent on this return, enter the person's name and Social Security Number here.
6	Qualifying widow(er) with dependent child. Name: SSN:

STEP 3 Exemptions

YOU (and spouse IF filing jointly)	a. Personal Credit: Enter 1 or Enter 2 if filing joint or head of household▲	X \$ 40 = \$
	b. Enter 1 for each spouse who is 65 or older and/or 1 for each spouse who is blind▲	X \$ 20 = \$
	c. Dependents: Enter 1 for each dependent▲	X \$ 40 = \$
	d. Enter first names of dependents here: _____	e. TOTAL \$
SPOUSE (IF filing status 3)	a. Personal Credit: Enter 1▲	X \$ 40 = \$
	b. Enter 1 if 65 or older and/or 1 if blind▲	X \$ 20 = \$
	c. Dependents: Enter 1 for each dependent▲	X \$ 40 = \$
	d. Enter first names of dependents here: _____	e. TOTAL \$

STEP 4

Figure your gross income

↑ Staple W-2s, payment, and voucher here. ↑

STEP 5

Figure your adjustments to income

STEP 6

Figure your Federal tax addition and deduction

	B. Spouse/Status 3	A. You or Joint	B. Spouse/Status 3	A. You or Joint
1. Wages, salaries, tips, etc.	1. .... .00	..... .00		
2. Taxable interest income. If more than \$400, complete Schedule B. ...	2. .... .00	..... .00		
3. Ordinary dividend income. If more than \$400, complete Schedule B. ...	3. .... .00	..... .00		
4. Alimony received	4. .... .00	..... .00		
5. Business income/(loss) from Federal Schedule C or C-EZ	5. .... .00	..... .00		
6. Capital gain/(loss) from Federal Schedule D. See page 6.	6. .... .00	..... .00		
7. Other gains/(losses) from Federal form 4797. See page 6.	7. .... .00	..... .00		
8. Taxable IRA distributions.	8. .... .00	..... .00		
9. Taxable pensions and annuities. See page 6.	9. .... .00	..... .00		
10. Rents, royalties, partnerships, estates, etc. See page 7.	10. .... .00	..... .00		
11. Farm income/(loss) from Federal Schedule F.	11. .... .00	..... .00		
12. Unemployment compensation	12. .... .00	..... .00		
13. Taxable Social Security benefits. See page 7.	13. .... .00	..... .00		
14. Other income. See page 8.	14. .... .00	..... .00		
15. GROSS INCOME. ADD lines 1-14.	15. .... .00 ▲	..... .00		
16. Payments to an IRA, KEOGH or SEP	16. .... .00	..... .00		
17. One-half of self-employment tax	17. .... .00	..... .00		
18. Health insurance deduction. See page 8.	18. .... .00	..... .00		
19. Penalty on early withdrawal of savings	19. .... .00	..... .00		
20. Alimony paid	20. .... .00	..... .00		
21. Pension/retirement income exclusion. See page 9.	21. .... .00 ▲	..... .00		
22. Moving expense deduction from Federal form 3903 or 3903F	22. .... .00	..... .00		
23. Iowa capital gains deduction. See page 9.	23. .... .00 ▲	..... .00		
24. Other adjustments. See page 10.	24. .... .00	..... .00		
25. Total adjustments. ADD lines 16-24.	25. .... .00 ▲	..... .00		
26. NET INCOME. SUBTRACT line 25 from line 15. See page 11 for possible exemption from tax.	26. .... .00 ▲	..... .00		
27. Federal income tax refund received in 1998.	27. .... .00 ▲	..... .00		
28. Self-employment/household employment taxes.	28. .... .00 ▲	..... .00		
29. Addition for Federal taxes. ADD lines 27 and 28.	29. .... .00	..... .00		
30. Total. ADD lines 26 and 29.	30. .... .00	..... .00		
31. Federal tax withheld.	31. .... .00 ▲	..... .00		
32. Federal estimated tax payments made in 1998.	32. .... .00 ▲	..... .00		
33. Additional Federal tax paid in 1998 for 1997 and prior years.	33. .... .00 ▲	..... .00		
34. Deduction for Federal taxes. ADD lines 31, 32, and 33.	34. .... .00	..... .00		
35. BALANCE. SUBTRACT line 34 from line 30. Enter here and on line 36, side 2.	35. .... .00	..... .00		

	B. Spouse/Status 3	A. You or Joint	B. Spouse/Status 3	A. You or Joint
STEP 7 36. BALANCE. From side 1, line 35.	36. ....	.00	36. ....	.00
37. Total itemized deductions from Federal Schedule A ..	37. ....	.00	37. ....	.00
38. Iowa income tax if included in line 37	38. ....	.00	38. ....	.00
39. BALANCE. SUBTRACT line 38 from line 37.	39. ....	.00	39. ....	.00
40. Other deductions. See page 13.	40. ....	.00	40. ....	.00
41. Deduction. Check one box. <input type="checkbox"/> Itemized. Add lines 39 and 40. <input type="checkbox"/> Standard. See page 14.	41. ....	.00	41. ....	.00
42. TAXABLE INCOME. SUBTRACT line 41 from line 36.	42. ....	.00	42. ....	.00
STEP 8 43. Tax (tables begin on page 22) or alternate tax (see page 14)	43. ....	.00	43. ....	.00
44. Iowa lump-sum tax. 25% of Federal tax from form 4972.	44. ....	.00	44. ....	.00
45. Iowa minimum tax. Attach IA 6251. See page 15.	45. ....	.00	45. ....	.00
46. Total tax. ADD lines 43, 44 and 45.	46. ....	.00	46. ....	.00
47. Total exemption credit amount(s) from Step 3, side 1	47. ....	.00	47. ....	.00
48. Iowa earned income credit: 6.5% of Federal credit	48. ....	.00	48. ....	.00
49. Tuition and textbook credit	49. ....	.00	49. ....	.00
50. Total credits. ADD lines 47, 48 and 49.	50. ....	.00	50. ....	.00
51. BALANCE. SUBTRACT line 50 from line 46. If less than zero, enter zero.	51. ....	.00	51. ....	.00
52. Credit for nonresidents or part-year resident. See page 15. Attach IA 126 and Federal return.	52. ....	.00	52. ....	.00
53. BALANCE. SUBTRACT line 52 from line 51.	53. ....	.00	53. ....	.00
54. Other Iowa credits. See page 15.	54. ....	.00	54. ....	.00
55. BALANCE. SUBTRACT line 54 from line 53.	55. ....	.00	55. ....	.00
56. School district surtax/EMS surtax. See page 16. Tables begin on page 26.	56. ....	.00	56. ....	.00
57. Total Tax. ADD lines 55 and 56.	57. ....	.00	57. ....	.00
58. Total tax before contributions. ADD Columns A & B on line 57 and enter here.	58. ....	.00	58. ....	.00
59. Contributions. See page 16. Contributions will reduce your refund or add to the amount you owe. Amounts must be in whole dollars. Fish/Wildlife 59a: <input type="checkbox"/> State Fair 59b: <input type="checkbox"/> Domestic Abuse 59c: <input type="checkbox"/> ADD Enter total.	59. ....	.00	59. ....	.00
60. TOTAL TAX AND CONTRIBUTIONS. ADD lines 58 and 59.	60. ....	.00	60. ....	.00
STEP 9 61. Iowa income tax withheld from Box 18 of your W-2(s).	61. ....	.00	61. ....	.00
62. Estimate and voucher payments made for tax year 1998	62. ....	.00	62. ....	.00
63. Out-of-state tax credit. Attach IA 130.	63. ....	.00	63. ....	.00
64. Motor vehicle fuel tax credit. Attach IA 4136.	64. ....	.00	64. ....	.00
65. Child and dependent care credit. See page 17.	65. ....	.00	65. ....	.00
66. Other refundable credits. See page 17.	66. ....	.00	66. ....	.00
67. TOTAL. ADD lines 61-66.	67. ....	.00	67. ....	.00
68. TOTAL CREDITS. ADD columns A and B on line 67 and enter here.	68. ....	.00	68. ....	.00
STEP 10 69. If line 68 is more than line 60, SUBTRACT line 60 from line 68. This is the amount you overpaid.	69. ....	.00	69. ....	.00
70. Amount of line 69 to be REFUNDED to you.	REFUND 70. ....	.00	70. ....	.00
71. Amount of line 69 to be applied to your 1999 estimated tax	71. ....	.00	71. ....	.00
72. If line 68 is less than line 60, SUBTRACT line 68 from line 60. This is the AMOUNT OF TAX YOU OWE.	72. ....	.00	72. ....	.00
73. Penalty for underpayment of estimated tax. From IA 2210 or IA 2210F.	73. ....	.00	73. ....	.00
74. Penalty and interest. See page 18. 74a. Penalty. 74b. Interest	74. ....	.00	74. ....	.00
75. TOTAL AMOUNT DUE. ADD lines 72, 73 and 74, and enter here.	75. ....	.00	75. ....	.00

STEP 11 POLITICAL CHECKOFF. See page 18. This checkoff does not increase the amount of tax you owe or decrease your refund. <div><div>SPOUSE <input type="checkbox"/></div><div>YOURSELF <input type="checkbox"/></div><div><div>\$1.50 to Republican Party <input type="checkbox"/></div><div>\$1.50 to Republican Party <input type="checkbox"/></div><div>\$1.50 to Reform Party <input type="checkbox"/></div><div>\$1.50 to Reform Party <input type="checkbox"/></div><div>\$1.50 to Democratic Party <input type="checkbox"/></div><div>\$1.50 to Democratic Party <input type="checkbox"/></div><div>\$1.50 to Campaign Fund <input type="checkbox"/></div><div>\$1.50 to Campaign Fund <input type="checkbox"/></div></div></div> <div>STEP 12 NEXT YEAR, I would like to receive: (check one) <input type="checkbox"/><div><div>0. a booklet with preprinted label</div><div>2. a postcard with a preprinted label only (not available to electronic filers)</div><div>1. neither a booklet nor a label</div></div></div> <div>STEP 13 COW-CALF REFUND Attach IA 132. Do NOT use these amounts to increase your refund (line 69) or reduce the amount you owe (line 72). See page 18. Spouse: \$ You: \$ <input type="checkbox"/></div>

STEP 14

I (We), the undersigned, declare under penalty of perjury that I (we) have examined this return, including all accompanying schedules and statements, and, to the best of my (our) knowledge and belief, it is a true, correct, and complete return. Declaration of preparer (other than taxpayer) is based on all information of which the preparer has any knowledge.

PLEASE SIGN HERE SIGN HERE • Verify your Social Security Number(s) • Recheck your math • Attach all W-2s	Your Signature	Date	Preparer's Signature	Date
	Spouse's Signature	Date	Address	
	Daytime Telephone Number	MAIL TO IOWA INCOME TAX PROCESSING DEPARTMENT OF REVENUE AND FINANCE HOOVER STATE OFFICE BUILDING DES MOINES IA 50319-0120	Daytime Telephone Number	Employer Identification or Social Security Number
	This return is due April 30, 1999.			